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Ron Hall's Big Plans For 7-Eleven/Citgo

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When Southland acquired Citgo's refining and marketing properties two years ago, some wondered whether the "marriage" would take. However, after a rocky beginning, Citgo chairman Ron Hall is mapping out strategies to take advantage of the combined strengths of the two companies. **Page 54**

Applying a formula he learned from a friend in the volume merchandising field, Arco dealer John Spencer has catapulted his gasoline sales from 100,000 gal./month to within a whisker of 1-million gal./month, causing a considerable ruckus in the always turbulent Phoenix market. **Page 61**

PMAA

As jobbers gather in Nashville, Tenn. for the fall convention and trade show of the Petroleum Marketers Assn. of America, many are looking for an answer to one question: Is there a place for me in this fast-changing marketplace? **Page 78**

• TRENDS

Fuel Oil Brinkmanship: Are Too Many Banking Too Much on Plain Good Luck?

The brinkmanship that has been going on with fuel oil inventories this fall has some observers wondering whether suppliers and marketers aren't pushing their luck too hard by cutting corners too thin this time.

There is no question that impressive arguments can be made for cost control and that high inventory levels aren't the way to go in July, August and September if that's the golden objective.

Much can be said too about conservation, declining demand, the spare refining capacity the industry has readily available to meet surge curves, and the fact that crude *and* product are available just about everywhere. So what if the Sept. 1 inventory levels are barely over the minimum levels? Nothing to worry about, according to most of the industry's spokesmen—and a surprising number of the distributors and their spokesmen as well.

But all those arguments and economic validators will be so much more dust in November and December if the industry is caught short by cold weather or some other unlucky break. Consumers aren't the least big impressed when they are cold and/or uncomfortable. Nor are they overjoyed when prices shoot up 5¢, 10¢ and perhaps 15¢ gal.—not because there is a basic shortage of product but because supplier tanks are temporarily depleted.

Already there are danger signals flying. In Washington, the Citizens/Labor Energy Coalition has already published a 15-page study in which it charged that there can be no reason for a fuel oil crisis this winter "except for a decision on the part of major oil companies to reduce supplies in order to drive prices higher than last year's levels."

The *Boston* (Mass.) *Globe*, in a mid-September editorial, commented; "Regretably, reserves of heating oil have not been made part of a public policy to avoid the less serious disruptions that in the past have forced prices up at the very worst of the season. Perhaps the next minor crisis, which is a likely even this winter, will at last inspire such a policy."

In other words, if the industry can't do it itself, the government will—or, at least, will be pressured to do so.

In recent years, the industry's stockpile of fuel oil at primary and secondary levels has been declining almost spectacularly. Two years ago, the industry had a primary supply of 154-million bbl. on Sept. 1; last year, it had 143-million bbl. This fall, it had only 116-million bbl. on Sept. 1—and didn't improve the situation a whit during the entire month. The total was actually 114.6-million bbl. on Sept. 20. That's less than 10-million bbl. above the so-called minimum inventory level, at which time run outs, shortages and operating problems could happen anywhere.

This is the sort of brinkmanship that has many industry people concerned. But some complacently say that the excesses of crude can hurriedly be put through the spare refinery capacity and presto, there would be no shortages.

There are two or three things to be remembered at this time. It takes basically two weeks from the time the extra supplies of crude are poured into the refineries until they reach consumer tanks on the other end of the distribution system. Not long in one sense, but a long time if the weather is very, very cold and consumers are screaming. There also are bottlenecks in the supply system to cope with. It must be remembered, too, that about 3-million b/d of refinery capacity has been shut down. What's left is very good but is it a positioning as strong as before to meet sudden demand imports? Also, have all of them been converted over to the winter distillate run? Some industry sources raise questions about that.

Industry and government forecasts have said repeatedly that with all of the excess supplies available, fuel oil prices would probably be very flat this winter and probably wind up perhaps 1¢ under last year's. This is deep-rooted enough now in consumer minds that if price spikes come—as they most assuredly will in the event demand shoots up unexpectedly—just about everything the industry has spent on its good-will image progress will go down the drain.

It would appear that many suppliers and jobbers banked on the weather as the heating season got underway. The opening line of 115-million bbl. of primary inventories, in the opinion of some industry people, was close to untenable. Perhaps a way to go would be to accept the minimum operating inventory level as a matter of fact, then position a minimum Sept. 2 inventory level above that. It would give the industry and the consumers alike a more comfortable feeling as the heating season got underway.

—J. Richard Shaner.

• MARKETPLACE AT A GLANCE

AVERAGE GASOLINE PRICES IN THE U.S. (¢ per gal.)

AUGUST	Gasoline (All types)	Leaded Regular	Unleaded Regular	Unleaded Premium
U.S. City Avg.	$1.222	$1.143	$1.229	$1.359
Regions:				
Northeast	1.237	1.154	1.228	1.355
North Central	1.240	1.172	1.260	1.393
South	1.205	1.122	1.208	1.348
West	1.210	1.130	1.217	1.360

Source: U.S. Dept. of Labor, Bureau of Labor Statistics.

STOCKS (Add 000 bbl.)

	9/27/85	9/28/84
Gasoline (total)	224,835	229,074
Gasoline (Unleaded)*	111,084	105,304
Jet Kerosine	36,553	38,546
Distillates	117,063	142,212
Residual	42,998	47,308

**Included in gasoline total.*
Source: American Petroleum Institute.

Imports Signal New Era of Turbulence

Oil marketing appears to be headed toward a period of jitters and turbulence that possibly could be its worst yet. One marketer says it's like being paddleless in a small boat drifting toward the rapids, and not being able to do much more than cross fingers.

Events and actions from all over are part of the growing storm—in the Middle East, which has more crude oil than it knows what to do with; in East Coast ports, where finished products are coming ashore via surprisingly different hands; in the street, where cheap gasoline is firing up competition; and in Washington, where legislative battles over fees and tariffs are intensifying.

Separately, each probably could be taken in stride. Collectively, however, and converging as they appear to be, they are formidable.

Crude Flood

Precipitating the latest upheaval is Saudi Arabia's decision to stop jawboning and make good on its oft-repeated threat to come back into the international markets with a flood of crude that nobody really needs or wants.

The Saudis are being taken seriously this time.

Oil Minister Ahmed Yamani told an Oxford, England, meeting in early September that production was to be increased 1-million b/d as of Oct. 1. Not long afterwards, industry and government circles heard that he had signed agreements with Exxon, Mobil and Texaco to take 850,000 b/d of the new production, and that negotiations were underway with one or two other companies to take care of the balance.

It was understood that Yamani also negotiated a new "netback" price for the crude oil that would be equivalent to about $2 to $2.50 bbl. discount. The "netback" is related to the price of the products that are refined from the barrel rather than the crude itself.

The price discount alone was unusual for Yamani because he has been the steadfast advocate in the OPEC cartel of cutting production and setting quotas rather than reducing prices as demand diminished.

Some OPEC members discounted prices and exceeded production quotas, however, leading Yamani to threaten repeatedly to flood the marketplace with crude to teach them self-discipline.

In recent years, Saudi Arabia's crude

East Coast Gasoline Importers

(First Six Months of 1985)

Top 15 Importers	b/d Avg. Leaded Mogas	b/d Avg. Unleaded Mogas	b/d Avg. Total Mogas	(Add 000 bbl.) Total Volume
Northville Industries	24,386	21,375	45,761	8,351
Will Petroleum	21,446	11,689	33,135	6,047(a)
Amerada Hess	3,911	28,094	32,005	5,841
Phibro Distributors	8,579	14,087	22,666	4,136
Texaco	4,265	10,586	14,851	2,710
UPG Inc.	6,160	7,825	13,985	2,552
Oxbow Resources	5,441	5,671	11,112	2,028
Shell	1,261	9,670	10,931	1,995
Citgo Petroleum	1,177	8,954	10,131	1,849
Belcher Oil	1,724	7,133	8,857	1,616
Sun	—	8,077	8,077	1,474
Bulk Oil (USA)	3,492	3,883	7,375	1,346(b)
Vitol Trading	3,409	3,431	6,840	1,248
Koch Industries	5,261	1,515	6,776	1,236
Ultramar Petroleum	1,154	4,948	6,138	1,120

(a)Also brought in 40,158 b/d of blending stocks in first half; total vol.: 7,329,000 bbl.
(b)Also brought in 5,317 b/d of blending stocks in first half; total vol.: 970,352 bbl.

Other Importers (in alphabetical order)				
Aectra USA	1,093	3,014	4,107	750(c)
Agway Petroleum	1	1	2	—
Anthony Petroleum	—	1,789	1,789	326
Anschutz Petroleum	3,916	—	3,916	715
Apex Oil	2,639	727	3,366	614
Astroline Pacific	—	1,059	1,059	193
Beaumont Oil	—	1,775	1,775	324
Buddy's Truck Stop	19	34	53	—
Cecil William	—	495	495	—
Coastal States Gas	1,371	1,168	2,539	463
D.C Transportation	58	46	104	—
Delphi Petroleum	1,202	—	1,202	219
Doug-Long Inc.	59	—	59	—
East. Seaboard Petro.	—	787	787	143
Econo Fuels	8	6	14	—
Elf Trading	—	1,514	1,514	276
Global Petroleum	—	3,951	3,951	721
Goetz Oil	114	60	174	—
Horizon Product Tr.	—	1,243	1,243	227
Kaiser Aluminum	—	1,305	1,305	238
Langham-Hill	—	4,317	4,317	788
Mabanaft, Inc.	1,600	—	1,600	292
Mobil	639	4,783	5,422	990
Noco Trading	—	994	994	181
Northeast Petroleum	—	3,542	3,542	646
Petro. Sales-Service	322	813	1,135	207
Power Test Petro.	—	1,255	1,255	229
Sipco Oil	160	—	160	—
Steuart Petroleum	—	716	716	131
Stinnes Interoil	—	2,882	2,882	526
Strikev Industries	—	48	48	—
Vanol USA	2,831	1,124	3,955	722
R. L. Vallee	13	16	29	—
Welch Energy	1	—	1	—
1211 Colvin Blvd. Inc.	—	136	136	—
Total Imports	**107,712**	**186,898**	**294,610**	**53,766**

(c)Also brought in 1,241 b/d of blending stocks; total vol.: 226,483 bbl.
Source: DOE, API and I.P. Sharp.

production has dwindled from 8-million b/d to the current level of about 2.5-million b/d.

Yamani also spoke tougher this time: "If non-OPEC producers do not cooperate with OPEC in stabilizing the market and we in the organization do not discipline ourselves, then I expect there will be a price war."

He suggested that a price war might see the floor drop as low as $18 bbl. by next spring. That would be $10 bbl. below the Saudis' official benchmark price of $28 bbl. and about $8 below the going market price.

Nightmare Alley

What $18 crude could do to American product prices and margins in 1986 is the kind of stuff that nightmares are made of.

In addition, some financial analysts say some major oil companies that acquired others or fought off takeover attempts in the past two or three years could be in trouble if crude oil prices dip below $20 bbl. Most of their deals were figured on the basis of prices holding up higher than that level.

There is an interesting aspect to the flood of product coming to the U.S. Where once the internationals dominated what small amounts of product that did come in, things changed rapidly in recent years.

Gasoline, for example. Only once or twice, in the decade preceding 1983, did gasoline imports exceed 200,000 b/d average. In 1983, however, they went up to 243,000 b/d; in 1984 to 299,000 b/d; and for the first six months of 1985, they exceeded 400,000 b/d on several occasions and averaged out to about 393,000 b/d for the period.

Government data show that six of the top 15 importers of gasoline into PAD 1 (East Coast) ports in the first half of 1985 were brokers, traders and blenders (See tables on p 41). There were eight in 1984 and a half dozen in 1983. This seems to indicate a changing role for brokers, traders and blenders.

One blender, about whom little is known outside the closed-mouth circles of traders and blenders, is Will Petroleum Corp., of New York. In the first half of 1985 Will brought in an average of 33,125 b/d of gasoline and an average of 40,158 b/d of blending components.

Check The Data

The government import statistics can be misleading, however. For example, Amerada Hess is listed as one of the biggest gasoline importers in PAD 1. Yet Hess is merely bringing in the product that is refined at its own facilities in the Virgin Islands, not gasoline from other parts of the world.

Shell brought in some foreign gasoline in the first half of 1985 but Texaco, Sun and Koch are the only consistent branded gasoline importers over the three-year span for which data are available. The biggest importer of overseas gasoline is Northville Industries, an independent which has its headquarters on Long Island and is a major supplier to independent marketers in the Middle Atlantic and lower New England areas.

Apex Oil, of St. Louis, had been a fairly active importer of gasoline in PAD 1 in 1983 and 1984 but dropped out of the top 15 in the first half of 1985. Ultramar Petroleum showed up as a growing importer in 1984 and 1985 but its gasoline comes from Canada rather than overseas.

The product data compiled by the government is difficult to classify and catalogue but the sources of the supply are many and varied. It may come as a surprise to some East Coast marketers that some of the gasoline they are selling comes from Romania and Soviet Russia.

The data and information supplied by Petroleum Industry Research Foundation confirm that there has been a distinct shift in the source of gasoline and other light

1984—Full Year

	b/d avg.			(Add 000 bbl.)
Top 15 Importers	Leaded MoGas	Unleaded MoGas	Total MoGas	Total Volume
Amerada Hess	9,532	39,286	48,818	17,819
Northville Industries	29,668	12,248	41,916	15,299
Apex Oil	25,086	10,625	35,711	13,035
Will Petroleum	12,274	6,671	18,945	6,915(a)
Texaco	1,218	8,766	9,984	3,644
Sun	3,048	6,789	9,837	3,591
Phibro Distributors	4,558	4,410	8,968	3,273
Koch Industries	3,902	2,712	6,614	2,414
Bulk Oil	—	5,364	5,364	1,958(b)
Ultramar Petroleum	187	4,394	4,581	1,672
Stinnes Interoil	628	3,912	4,540	1,657
Langham-Hill	—	4,380	4,380	1,599
Global Petroleum	205	4,170	4,375	1,597
Anschutz Petroleum	3,243	—	3,243	1,184
Falco, Inc.	1,734	1,144	2,878	1,050
Other Importers (in alphabetical order):				
Aectra USA	—	1,790	1,790	653
Astroline Corp.	—	541	—	197
Augsbury Corp.	7	7	14	—
Belcher Oil	695	1,775	2,470	902
Broskin Trucking	2	—	2	—
Buddy's Truck Stop	5	10	15	—
Citgo Petroleum	408	1,386	1,794	655
Coastal States Gas	—	1,183	1,183	432
D/C Transportation	17	8	25	—
East. Seaboard Petro	—	28	28	—
Gill/Duffus Chem.	726	—	726	265
Goetz Oil	—	4	4	—
Gulf Oil	648	—	648	237
Irving Oil	—	83	83	—
Kaiser Aluminum	1,827	—	1,827	667
Mabanaft Inc.	487	—	—	178
Massena Petroleum	1	1	2	—
Mobil	—	612	612	223
Noco Trading	—	978	—	357
Northeast Petroleum	—	1,213	1,213	443
Purdy Coal/Oil	2	5	7	—
Shell	355	230	585	214
Sipco Oil	6	—	—	—
Steuart Petroleum	—	1,733	1,733	633
Eli Tarbell	3	—	3	—
Unipetrol	130	886	1,016	371(c)
R.L. Vallee	—	3	3	—
Cecil William	—	1,287	1,287	470
1211 Colvin Blvd. Inc.	83	338	421	154
Total Imports	**101,506**	**130,930**	**232,436**	**84,839**

(a) Also brought in 22,438 b/d of blending stocks; total vol.: 8,189,870 bbl.
(b) Also brought in 3,823 b/d of blending stocks; total vol.: 1,395,395 bbl.
(c) Also brought in 12,311 b/d of blending stocks; total vol.: 4,493,515 bbl.
Source: DOE, API and I.P. Sharp.

product imports. Throughout most of the '70s and as recently as 1980, as much as 89% of the light products came from "short haul" places such as the Caribbean and Canada. By 1984, however, this had declined to 63%. Newcomers of importance as suppliers of gasoline and other products via East Coast ports include Brazil, Romania, United Arab Emirate and Western Europe. These countries now account for more than 80,000 b/d of gasoline and almost 30,000 b/d of blending stocks.

Of significance too is the fact that the OPEC countries are coming on stream with as much as 2.5-million b/d of new capacity by 1987 which may see, under one set of circumstances, as much as 850,000 b/d of gasoline, distillates and other light products looking for homes in U.S. marketplaces over the next two years [*NPN*—Oct. '85, p44]. This flow cannot help but exacerbate an already difficult situation for U.S. marketers if the Saudi crude of 1-million b/d is readily available and other OPEC begin churning out more crude and product to hang on to their declining pieces of the market pie.

The Shift in Product Imports—1978-1984

	Per Cent of Total					
	Finished Gasoline		Total (a) Light Oils & Fin. Prods.		Total (a) Volume (000 b/d)	
	1978	1984	1978	1984	1978	1984
International Majors	21%	8%	25%	8%	111	82
Domestic Refiners	69%	28%	60%	41%	261	399
Traders, Marketers & Blenders	10%	64%	15%	51%	64	490

(a) Totals for light oils and finished products and liquid volumes include distillates, jet fuel, kerosine, naphtha, unfinished oils and feedstocks.
Source: Petroleum Industry Research Foundation, "Outlook for Light Products Imports into the U.S.," June 1985, API, DOE base.

1983—Full Year

Top 15 Importers	b/d Avg. Leaded Mogas	b/d Avg. Unleaded Mogas	b/d Avg. Total Mogas	(Add 000 bbl.) Total Volume
Amerada Hess	11,257	43,318	54,575	19,920
Northville Industries	29,065	3,111	32,176	11,744
Will Petroleum	4,291	17,273	21,556	7,871(a)
Apex Oil	8,624	9,092	17,716	6,466
Sun	4,400	12,336	16,736	6,109(b)
Phibro Distributors	3,786	2,525	6,311	2,304
Anschutz Petroleum	4,950	—	4,950	1,807
Stinnes Interoil	3,902	—	3,902	1,424
Koch Industries	1,769	2,127	3,896	1,422
Bulk Oil (USA)	—	3,810	3,810	1,391
Northeast Petroleum	2,598	823	3,421	1,249
Texaco	—	2,163	2,163	789(c)
Falco, Inc.	2,014	—	2,014	735
TampimEx, Inc.	747	894	1,641	599
TampimAx, Intl.	1,383	—	1,383	505
Other Importers (in alphabetical order):				
Aectra USA	—	478	478	174
Astroline	—	209	209	—
Augsbury Corp.	150	—	150	—
Broskin Trucking	169	193	372	136
Buddy's Truck Stop	13	17	40	—
Centurian Motors	2	—	2	—
Champlin Oil	14	—	14	—
Coastal States	504	66	570	208
Colonial Oil	373	181	554	202
Commonwealth Gas	15	—	15	—
Coral Petroleum	—	1,372	1,372	501
Doug-Long Inc.	77	48	125	—
Gas N Go Enter.	153	66	219	—
Global Petroleum	201	161	363	132
Goetz Oil	171	196	367	134
Massena Petroleum	6	17	23	—
Noco Trading	35	784	869	317
Power Test Petro.	60	—	—	—
Scan Oil, Inc.	205	—	205	—
Shell	712	—	712	260
Sipco Oil	103	206	309	113
S. B. Collins	88	8	96	—
A. Tarricone	70	—	70	—
Eli Tarbell	241	136	377	138
Transpetro USA	548	16	564	206
T.W.-Oil	614	—	614	224
Unipetrol	612	157	769	281
R. L. Vallee	139	206	345	126
Cecil William	—	681	681	249
1211 Colvin Blvd. Inc.	497	184	581	212
Total Imports	**88,189**	**102,672**	**190,861**	**69,664**

(a)Also brought in 8,117 b/d of blending stocks; total vol., 2,962,705 bbl.
(b)Also brought in 721 b/d of blending stocks; total vol., 263,165 bbl.
(c)Also brought in 326 b/d of blending stocks; total vol., 118,990 bbl.

Source: DOE, API and I.P. Sharp

Tariff Battle

While this is going on, there is the growing fight in Washington over imports and tariffs on the increasing flow of products. The independent marketers, led notably by Petroleum Marketers Assn. of America and the Society of Independent Gasoline Marketers of America, want no part of fees or tariffs, insisting they would inhibit the flow of free trade and possibly would remove a competitive opportunity with domestic suppliers. The Reagan Administration also is opposed to fees and tariffs on the grounds that it constitutes another form of tax increases.

At a House subcommittee hearing in September, PMAA president David Robinson testified that "refined product imports provide an important source of price competition for domestic refiners, thus keeping the price of products lower for the American consumer." Similar support was voiced by Leonard Steuart of Washington, D.C., in behalf of the Coalition of Gasoline Marketers, and Carl Bolch, a Georgia independent, in behalf of SIGMA. Supporting the pro-fee/tariff/import restrictions position was Roger Hemminghouse, president of Diamond Shamrock, who appeared for the Independent Refiners Coalition.

The IRC is comprised of the American Independent Refiners Assn. and 15 nonmajor refining companies [*NPN*—April '85, p29]. Formally organized earlier this year, the IRC reportedly has built a $2-million warchest for lobbying efforts aimed at legislation to enact quotas limiting the amount of imported refined products. NPN

Crude Reserves Up, But Gas Reserves Decline

Although crude oil reserves rose for the first time in 14 years, there's not much else to cheer about in the federal government's annual appraisal of the oil and gas reserves that this country has available to meet current and future energy needs.

Crude oil reserves increased 711-million bbl. in 1984, or 2.6% over the preceding year's total. But since the nation is producing a little more than 3-billion bbl. from its own wells, that's equivalent to less than three months of extras on the shelf.

At the same time, the proved reserves of natural gas liquids and natural gas declined in 1984—the second time in recent years for natural gas liquids and the sixth time in the past eight years for natural gas. Gas liquids reserves were estimated at 7.6-million bbl., and those of natural gas at 197.5-trillion cubic feet.

Theoretically, the crude oil reserves would last for 9.4 years if not another drop was found—which is highly unlikely—and natural gas, for 11.5 years on the same basis.

The last big year for net additions to the proved reserves of both crude oil and natural gas took place in 1970 when the Alaska's Prudhoe Bay discoveries were added to the totals for the first time. Crude oil's reserves went up 9.6-billion bbl. and gas's, 26-trillion cubic feet.

A point to remember in evaluating the 1984 increase in crude oil reserves is that the bulk came from net additions to established fields rather than new discoveries. In other words, the productive potential of various fields was re-evaluated in the light of enhanced recovery technology and improved operations.

The net revisions amounted to 2.4-billion bbl. and the "new" discoveries (including extensions and new reservoirs in old fields), 1.1-billion bbl. The net increase for the year was 711-million bbl., raising the 1984 total to 28.4-billion bbl. from 27.7-billion bbl.

An interesting aspect of the 1984 report was that Alaska's share of the crude oil reserves (7,563-million bbl.) exceeded those of Texas (7,557-million bbl.) for the first time.

The reserve estimates are made by the Energy Information Administration of the Department of Energy. The American Petroleum Institute and the American Gas Assn. traditionally estimated the reserves but once the government had established its bearings, they turned the project over to it in 1980. NPN

	Liquid Hydrocarbons (In million of bbls.)				Natural Gas (In billions of cf.)	
Year*	Crude Oil Reserves	Natural Gas Liquids Reserves	Total Liquid Hydrocarbons Reserves	Indicated Years of Supply	Natural Gas Reserves	Indicated Years of Supply
1984	28,446	7,643	36,089	9.5	197,463	11.5
1983	27,735	7,901	35,636	9.5	200,247	12.7
1982	27,858	7,221	35,079	9.6	201,512	11.5
1981	29,426	7,068	36,514	9.9	201,730	10.8
1980	29,805	6,728	36,533	9.9	199,021	10.6
(Peak year)						
1970	39,001	7,702	46,703	11.7	290,746	13.3

Source: Energy Information Administration, American Petroleum Institute

Import Fees May Surface Again in 1986

Although President Reagan rejected an oil import fee earlier this year, a bipartisan group of U.S. senators may be laying the groundwork for another attempt for one by the end of the year.

Led by Sen. Bennett Johnston (D-La.), 43 lawmakers in August sent a letter to Commerce Department Secretary Malcolm Baldridge asking for an investigation into whether increased gasoline imports pose a threat to national security. The Commerce Department had not acted on the request by late September.

In the letter, the senators said domestic refining capacity has dropped from 16.9-million b/d to 15.6-million b/d. At the same time, U.S. demand has risen to 15.9-million b/d., the lawmakers claimed.

The investigation is backed by the Independent Refiners Coalition, which has spent much of the last year lobbying for increased oil import tariffs. IRC members include Crown Central Petroleum Corp., Ashland Oil Co., The Coastal Corp., Diamond Shamrock Corp. and Tosco Corp.

If Commerce launched a probe and found that the nation's energy security is threatened by imports, an oil import fee could be one of the recommendations made to ensure an adequate domestic refining capacity. Such a fee is adamantly opposed by the Petroleum Marketers Assn. of America and the Society of Independent Gasoline Marketers of America.

New PMPA Amendments Are Introduced, But Jobbers Don't Like It

Legislation which would amend the Petroleum Marketing Practices Act (PMPA) to benefit only dealers has been introduced by Rep. James Florio (D-N.J.).

The bill, offered at the request of the New Jersey Gasoline Retailers Association, is based on pending PMPA legislation put forth in May by Reps. Mike Synar (D-Okla.) and Tom Tauke (R-Iowa). It would require major oil companies to be "fair and reasonable" in marketing practices and third party leases with dealers.

Contrary to the Synar-Tauke measure, however, the Florio bill contains no language which would benefit marketers. Al Cobb, director of legislative affairs for the Petroleum Marketers Assn. of America, said PMAA had no part in drafting the Florio proposal and supports only the Synar-Tauke bill.

Introduction of the dealer-only bill might be seen as a further indication of the rift which has developed between a handful of state dealer associations and the Washington, D.C.-based Service Station Dealers of America [*NPN*—Sept. '85, p16]. State delegations from New Jersey, Georgia, Michigan and Pennsylvania/Delaware bolted from the SSDA this summer after complaining about the "misplaced priorities" of the national association. Along with the Texas Service Station Assn., they then formed the National Coalition of Petroleum Retailers and hired Washington lobbyist Jerry Glover.

Jerry Ferrara, executive director of the New Jersey delegation, said SSDA was not consulted about the Florio bill. The state groups plan to rejoin SSDA "when SSDA orients their prime focus to legislation and keeping dealers informed."

Ferrara said the Florio measure "takes nothing away" from the Synar-Tauke bill. In fact, he said, the state delegations which pulled out of SSDA still support Synar-Tauke. The dealer-only amendments, however, may stand a better chance of passing on their own, Ferrara claimed.

For its part, SSDA is playing down the importance of the new legislation. SSDA executive director Vic Rasheed said the bill is "sort of redundant" because its language is basically identical to the dealer language in Synar-Tauke backed by SSDA.

Hearings are expected on the Synar-Tauke bill before the end of the year in the fossil fuels subcommittee of the House Energy and Commerce Committee. It is not clear whether the Florio dealer-only proposal will be heard separately. NPN

Wholesale Employment Continues to Sag, IPAA Study Finds

Employment in the wholesale segment of the oil marketing industry sagged to 207,872 by the end of 1984, the lowest level in recent years, according to "The Oil & Gas Producing Industry In Your State," which is published annually by Independent Petroleum Assn. of America.

This was the fourth straight year of decline in wholesale employment.

Retail employment, primarily service stations, also declined somewhat in 1984, according to IPAA.

It is next to impossible, however, to relate these figures to marketplace retrenchment and changes. It might be assumed, for example, that with the service station population shrinking year after year that retail employment would also be going down constantly, but such is not the case. Over the past six years, employment has been as low as 558,462 and as high as 606,196 and not in a consistent pattern either.

IPAA says the totals are estimates based on the best obtainable data from various state and federal agencies.

These are the totals for recent years:

Year	Wholesale	Retail	Total Industry(*)
1984	207,872	576,468	1,743,529
1983	223,974	586,433	1,976,488
1982	225,394	558,462	1,865,305
1981	226,063	561,172	1,835,303
1980	217,248	606,196	1,762,825
1979	231,616	584,227	1,642,843

(*) Total industry includes production, refining and transportation except gas pipelines but including gas distribution employees.

On a state-by-state basis, here are the wholesale, retail and industry employment totals for 1984, as compiled by IPAA

State	Wholesale	Retail	Total Industry
Alabama	4,869	7,317	17,591
Alaska	531	1,270	11,514
Arizona	1,434	7,582	10,372
Arkansas	2,710	4,624	14,537
California	16,052	61,577	159,289
Colorado	2,885	8,289	39,556
Connecticut	2,575	9,243	13,357
Delaware	282	1,360	2,966
Dist. of Columbia	232	1,066	2,139
Florida	7,006	29,044	39,645
Georgia	6,013	15,520	26,049
Hawaii	549	3,580	4,878
Idaho	1,545	2,487	4,503
Illinois	9,908	26,293	60,618
Indiana	3,643	14,520	25,731
Iowa	3,225	10,940	15,860
Kansas	2,750	7,650	35,600
Kentucky	2,819	9,511	22,752
Louisiana	5,700	8,400	113,100
Maine	1,214	2,544	3,773
Maryland	3,184	13,133	17,805
Massachusetts	3,691	14,173	23,104
Michigan	5,387	21,370	41,035
Minnesota	2,558	15,437	20,677
Mississippi	3,622	5,205	21,177
Missouri	6,867	14,937	27,639
Montana	1,509	2,581	9,458
Nebraska	1,849	6,131	12,553
Nevada	393	3,460	4,915
New Hampshire	518	2,701	3,478
New Jersey	4,030	20,017	35,350
New Mexico	1,762	4,198	24,267
New York	10,033	29,246	59,457
North Carolina	5,203	9,271	17,247
North Dakota	2,405	2,174	11,912
Ohio	5,876	27,915	60,129
Oklahoma	6,091	6,626	98,513
Oregon	2,225	7,736	11,593
Pennsylvania	10,700	26,500	63,100
Rhode Island	534	2,377	3,795
South Carolina	3,498	7,105	11,196
South Dakota	1,441	2,634	4,413
Tennessee	4,588	11,922	19,328
Texas	24,910	35,660	393,703
Utah	1,646	4,557	14,872
Vermont	308	1,654	2,085
Virginia	7,620	14,615	25,190
Washington	2,653	9,533	19,149
West Virginia	2,190	3,737	18,195
Wisconsin	3,362	14,107	20,987
Wyoming	1,277	2,939	23,577
Total U.S.	**207,872**	**576,468**	**1,743,529**

(For data on earlier years, see NPN Factbooks.)

Court Backs Amoco in Dealer Termination Suit

The Petroleum Marketing Practices Act will not aid an Amoco dealer who sought to block the supplier from terminating its agreement for business reasons, a federal court in Philadelphia has ruled.

A test of the law was sparked by Stephen and Thomas Pietras, owners of a Glenolden, Pa., property that had become unprofitable. Sales had declined from approximately 312,000 gal. in 1972 to 150,000 gal. in 1983, and, as a result, Amoco notified the Pietrases that it would not renew when its supply agreement expired in June 1984.

The Pietrases sought injunctive relief under PMPA, and the parties agreed to maintain the status quo pending resolution of the suit.

Amoco's petition to dismiss the suit was granted by U.S. District Court judge Thomas O'Neill, who agreed that the company acted in good faith in not renewing the franchise. He noted that the station had no self-service pumps and sold gas at substantially higher prices than nearby competitors.

Judge O'Neill also noted that the property rated 0.0% in Amoco's profitability index, falling far below the level under which the firm routinely severs retail relationships. At about the same time, nine other stations were also evaluated, and franchises were not renewed at those with ratings below 10%, he said.

The court ruled that Amoco's index was employed in good faith, not as a pretext for ending a business relationship. NPN

Getty Petroleum Adds C-Stores to Station Mix

Getty Petroleum Corp., the new name for superjobber Leo Liebowitz' old Power Test Corp., now has 65 convenience food stores in its 105-station Power Test Div. and is adding more at the rate of six per month.

The company, based in Plainview, N.Y., says it earned $3.3-million in the first six months of 1985, that its gasoline profits improved in June, July and August, and that its multi-faceted expansion program is making steady progress.

Liebowitz says total revenues during the first half were $590-million. Neither the profits nor the revenues were realistally comparable with year-ago figures because Getty did not officially acquire control of the old Getty marketing network until last February.

Power Test adopted Getty as its new corporate name and made Power Test a division. Both names are being used for selling gasoline. Liebowitz says that since the acquisition last February, 105 Power Test stations have been converted to the Getty brand "with a resulting ultimate increase of volume and improved profit margins."

Power Test bought the Getty assets from Texaco as part of a required spinoff to win government approval of the merger. NPN

Pricing Probe Sought

A Washington-based consumer group predicts home heating oil prices will rise as much as 10¢ gal. this winter and says Congress should investigate whether major oil companies conspired to prop up prices.

The Citizen-Labor Energy Coalition said in late September that nationwide home heating oil inventories were down 20% from the same time last year. East Coast inventories were down 25%, according to the coalition's assistant director, Ed Rothschild.

Rothschild said Congress and the U.S. Department of Justice should investigate whether inventories were deliberately kept low through collusion on the part of oil companies. He claimed U.S. refiners slashed production earlier this year during an onslaught of merger activity, despite the fact that imports were declining at the same time.

National Petroleum Refiners Assn. president Urvan R. Sternfels dismissed Rothschild's allegations as "probably irresponsible." Sternfels conceded that inventories are low, but said major oil companies have been hesitant to buy high-priced crude because of expectations that OPEC will cut its prices. NPN

PMAA Survey: Jobber Sales Up, But Profits Are Squeezed

Jobbers continued to hang tough in a fast-changing market, according to a new study, "The 1985 Petroleum Marketing Factbook," by the Petroleum Marketers Assn. of America and the Petroleum Marketing Education Foundation.

The profile study, the first joint effort by the two groups, shows that marketers, despite fewer numbers, are maintaining a firm grip on their share of the market, with over half of the motor gasoline sold, almost 60% of the diesel fuel and more than 75% of home heating oil.

Product sales are up for the average marketer, too, according to the study, reflecting the fewer-but-larger-jobbers nature of the business in the past few years. Jobber fallout may also be slackening. Although 6,000 jobber firms have gone belly up since decontrol in 1981, PMAA says membership in its affiliated associations declined only 2.1% in the 1983-1984 period. The survey went only to members, but that membership represents 92% of the jobber universe, according to PMAA.

Major points brought out in the study include:

- The average jobber sold 7.8 million gals. in 1984, up from 7.12 million gals. in 1982. Medium volume was up to 3.91 million gals. in 1984 from 3.18 million gals. in 1982. Total jobber product sales in 1984 exceeded 82 billion gals.
- Jobber profits, on the other hand, are being squeezed. Net profits after taxes were down to .47% of sales in 1984 from .59% the previous year. Return on assets, at 2.89%, also fell below the 5% prior year figure. Collective assets of PMAA members exceed $15 billion.

Jobbers are streamlining, diversifying and generally running tighter ships, the study shows. The total number of outlets, employees, service vehicles and bulk plants has declined since 1982.

- Number of jobber supplied outlets was off 7.3%, to 99,967, in 1984.
- Number of employees dropped 13% to 239,672, approximately half the total of jobber employees in 1980.
- The service vehicle population is down 9.3% with a big drop in jobber-owner transports of 31.9%.
- Number of bulk plants declined 38% and storage capacity dropped 27% to 1.7 billion gals.

On the plus side, the study points to the trend in direct-operated stations, increases in C-store business and diversification in product sourcing.

PMAA Statistical Quick Reference Sheet
1984 Data

Number of Marketers Represented		10,568
Total Volume of Refined Products Sold		82.9 billion gallons
Employment		239,672
Full Time Employment		177,416
Part Time Employment		62,256
Percent of U.S. Total Refined Products		34.4%
Motor Gasoline		50.0%
Diesel Fuel		59.1%
No. 2 Fuel Oil		75.5%
Number of Marketers by Product	Number	% of Total
Heating fuels Only	1,078	10.2%
Motor Fuels Only	3,942	37.3%
Both Heating & Motor Fuels	5,548	52.5%
Total	10,566	100.0%
Combined Asset Size of Marketers		$15.1 billion
Total Motor Fuels Retail Facilities Supplied		99,967
Total Motor Fuels Retail Facilities Owned		46,046
Heating Fuels Distribution Channels		% of product
Residential		63%
Commercial		18%
Other Fuel Oil Marketers		5%
Industrial		8%
Other		6%
Motor Fuels Distribution Channels		% of product
Direct Owned & Operated		30%
Lessee Dealer		14%
Open Dealer		21%
Bulk End Users		30%
Others		5%
Bulk Storage Capacity		1.7 billion gallons
Number of bulk storage facilities		10,567

Percent of Marketers by Size Distribution

Millions of Gallons Sold	1984	1982	1980
Less than 1.0MM gallons	13.8	18.0	10.0
1.0- 2.49	23.8	26.3	24.1
2.5- 4.99	21.9	20.8	23.5
5.0- 7.49	12.2	9.7	11.2
7.5- 9.99	6.6	6.7	8.8
10.0-14.99	9.3	7.1	12.9
15.0-19.99	3.8	2.8	
20.0-24.99	2.2	1.8	4.1
25.0-29.99	1.7	1.4	
30.0-39.99	1.8	1.5	5.3
40.0-49.99	1.1	1.2	
50.0-and above	1.8	2.7	
Average Volume	7.80	7.12	7.22
Median Volume	3.91	3.18	4.18

Sources: PMAA 1984 Supplier Cup Survey
PMAA 1982 and 1980 Marketer Profile Surveys

The number of stations salary-operated by jobbers jumped 11.6% in the two-year period, while the number of lessee and open dealers declined by 7.6% and 3.9% respectively.

In 1984, jobbers increased the number of C-stores they own and operate to 14,235. Jobbers also diversified their sources of supply, says the study, "with the typical marketer having as many as four sources of product."

Use of computers and electronics is soaring, the PMAA/PMEF study shows. Computer use by jobbers jumped from 49.4% in 1982 to 63% in 1984. Use of automated fueling systems rose from 33.7% to 44%, with another 21% of the responding jobbers saying they plan to install AFS systems this year.

The study reports that jobbers still sell about 70% of their product under a major flag, and that 80% of their product purchases are from integrated refiners. NEW

1984 Diversified Operations

Operations	# of Operations
auto repair/maintenance center	7,081
auto/truck/trailer rentals	338
beverage (only) stores	228
car washes	2,961
convenience stores	14,235*
fast food operations	1,002
heating/air conditioning service	3,189
kerosene heater sales	1,275
lube centers	1,549
plumbing service	501
tire/TBA stores	3,507
truck stops	1,734
towing service	911
coal sales	164
other	1,000

*This number may appear unusually large and contains not only owned but also franchised operations. Additionally, it is not directly comparable to other convenience store estimates. For example, many industry estimates of C-store populations are based on census data. This data would count a retail facility as a C-store if and only if more than 50 percent of revenues were generated from C-store merchandise. Therefore, a store selling 60 percent motor fuels would not be included in the census estimates. It might, however, be included in a marketers definition of a C-store.

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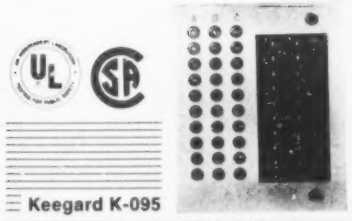

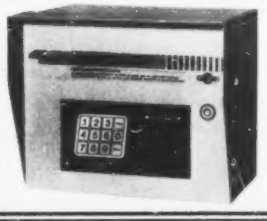

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Product Consumption Data Affirm Texas's Role as No. 1

Texas, which has more oil wells than any other state (200,000-plus), and more crude production as well (900-million-plus bbl. in '84) also is the nation's No. 1 consumer of oil products.

The latest update indicates that Texas accounted for 665-million bbl. of products last year, almost 100-million bbl. more than California at 575-million bbl.

The statistical data were pulled together by Independent Petroleum Assn. of America for its yearbook, "The Oil & Gas Producing Industry in Your State, 1985-1986," which was published in late September (See adjoining table).

California was the nation's biggest consumer of gasoline in 1984—275-million bbl., substantially ahead of secondplace Texas at 249-million bbl.

But Texas reigned supreme in consumption of aviation fuels, middle distillates and propane. The middle distillate statistics include kerosine and diesel fuel for transportation so it can easily be seen that much of this went into agricultural uses.

Rhode Island, smallest state in the Union, nevertheless was not the last in the rankings—as might be expected. It consumed 26.5-million bbl. of petroleum products last year, not quite four times that of Vermont, at 6.8-million bbl.

By way of comparison, Vermont's total consumption for 1984 would have lasted about 3-½ to 4 days in Texas.

Total products consumed in the U.S. last year amounted to 5.8-billion bbl. That averages out to 15.8-million b/d.

Finding new oil to replace the oil that's produced is a costly affair. The IPAA data shows that offshore wells cost an average $386.59 per foot to drill versus $69.85 per foot for onshore wells.

In 1983, the U.S. industry drilled 1,270 offshore wells to an average depth of 10,104 feet. The total cost for these wells alone was $5-billion, or an average of $3.9-million per well.

Onshore wells ran an average depth of 4,352 feet. There were 66,266 in 1984, at a total cost of $20-billion, or an average cost of $304,000 per well.

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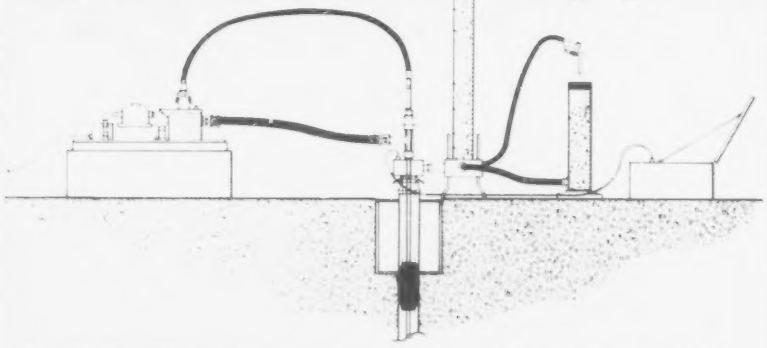

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New Mobil Super Unleaded

Mobil Oil is now on the market with a new super unleaded with double the amount of detergent to help clean up dirty fuel injectors and boost engine performance in new cars. The new product has replaced Mobil's conventional super unleaded gasoline.

Mobil says the new fuel was designed specifically for the high-tech engines on today's highways.

Major auto makers recently identified clogged port fuel injectors as a growing problem with the new cars, says Mobil, adding: "Our research has proven that one to two tanksful of the new Mobil super unleaded formulation can actually clean clogged fuel injectors and improve overall engine performance." NN

Product Consumption in 1984—State by State

(Add 000 bbl.)

	Motor Gasoline	Aviation Fuels	Middle Distillates(a)	Residual Fuel	Asphalt Road Oil	Propane	All Other(b)	Total Products
Alabama	41,155	2,985	15,541	2,186	4,121	3,583	10,679	80,250
Alaska	8,775	13,422	11,424	714	498	144	5,369	40,346
Arizona	33,496	4,097	7,639	238	2,825	286	7,457	56,038
Arkansas	26,952	598	12,688	641	861	3,297	6,913	51,950
California	274,876	52,834	83,889	59,067	17,350	10,413	76,507	574,936
Colorado	37,240	8,137	11,870	138	3,512	2,517	9,734	73,148
Connecticut	31,529	980	15,734	32,209	1,062	1,072	12,677	95,263
Delaware	6,894	84	8,979	3,692	270	562	3,144	23,625
Dist. of Columbia	3,677	96	3,304	(c)	23	—	1,090	8,190
Florida	118,880	18,848	30,780	40,391	7,903	7,669	34,455	258,926
Georgia	67,093	14,291	20,175	3,424	6,410	5,118	17,884	134,395
Hawaii	8,121	10,415	2,834	11,959	233	288	5,196	39,046
Idaho	9,796	319	5,168	333	539	532	2,561	19,248
Illinois	99,327	2,164	28,434	1,361	6,511	7,525	22,306	167,628
Indiana	57,001	14,644	28,413	2,330	6,821	5,022	17,534	131,765
Iowa	33,839	564	16,644	357	2,093	7,396	9,347	70,240
Kansas	51,193	2,723	28,763	756	2,192	33,965	18,357	137,949
Kentucky	37,996	2,942	18,096	410	2,467	4,435	10,184	76,530
Louisiana	51,243	10,549	33,699	27,177	2,296	11,206	20,901	157,071
Maine	12,970	416	9,651	10,766	1,266	562	5,469	41,100
Maryland	42,518	2,250	17,379	8,911	5,702	1,611	12,030	90,401
Massachusetts	51,951	6,563	34,911	42,990	1,248	1,224	21,319	160,206
Michigan	94,150	4,310	24,143	1,672	3,172	8,397	20,851	156,695
Minnesota	57,301	7,140	24,708	1,393	5,308	5,523	15,560	116,933
Mississippi	29,744	1,239	15,381	4,953	4,048	6,435	9,486	71,286
Missouri	55,560	5,398	17,140	352	4,502	4,896	13,484	101,332
Montana	12,027	627	7,400	633	1,382	1,187	3,570	26,826
Nebraska	17,400	648	11,382	238	718	3,533	5,206	39,125
Nevada	10,888	3,591	5,355	54	853	522	3,264	24,527
New Hampshire	5,556	281	6,178	4,068	1,100	775	2,756	20,714
New Jersey	103,564	40,267	78,591	41,172	7,095	2,653	41,957	315,299
New Mexico	19,146	1,067	8,639	487	2,161	5,338	5,654	42,492
New York	109,968	2,373	66,171	64,482	6,124	4,984	39,003	293,105
North Carolina	70,446	3,781	27,063	6,173	4,377	6,246	18,126	136,212
North Dakota	10,118	211	8,431	853	1,132	2,991	3,643	27,379
Ohio	107,087	6,179	38,667	2,361	7,822	4,772	25,617	192,505
Oklahoma	43,398	4,501	18,706	1,621	3,516	9,115	12,411	93,268
Oregon	30,936	1,854	16,411	3,257	2,863	1,149	8,668	65,138
Pennsylvania	108,545	9,987	54,609	22,520	4,617	4,896	31,493	236,667
Rhode Island	10,533	386	8,563	1,749	1,519	205	3,523	26,478
South Carolina	35,370	542	11,309	2,939	1,412	3,168	8,402	63,142
South Dakota	9,075	208	5,777	64	915	1,516	2,695	20,250
Tennessee	62,457	3,392	26,944	610	4,339	2,006	15,311	115,059
Texas	248,828	57,790	131,562	50,825	12,197	75,357	88,499	665,058
Utah	16,757	2,493	6,603	749	1,524	965	4,465	33,556
Vermont	2,646	154	1,831	234	257	765	904	6,791
Virginia	58,435	7,334	26,425	9,647	4,158	2,276	16,620	124,895
Washington	46,305	13,100	24,277	9,011	2,986	2,019	14,996	112,694
West Virginia	14,422	203	6,912	1,433	543	560	3,695	27,768
Wisconsin	47,582	1,400	19,328	143	1,723	5,580	11,628	87,384
Wyoming	7,140	179	9,109	343	1,390	3,295	3,293	24,749
TOTAL U.S.	**2,551,906**	**350,556**	**1,153,630**	**484,086**	**169,956**	**279,551**	**765,893**	**5,755,575**

(a) Includes kerosine.
(b) Includes naphtha, lubricants, waxes, petroleum coke and still gas.
(c) Included with Maryland data.
Source: The Oil & Gas Producing Industry in Your State, 1985, published by Independent Petroleum Assn. of America; Energy Information Administration and The Asphalt Institute.